

**2007 Tax Season  
Site Coordinator Academy Curriculum  
Saturday, January 5, 2008  
10am – 2pm**

- I. Role/Responsibility**
  - a. Define the Site Coordinator's Role
  
- II. Resource Guides**
  - a. Publications/Handbooks (Pub. 17, 1084, 3189, 4012)
  - b. TaxWise Online Resources
  - c. IRS Online Resources
  - d. Site binder
  - e. Useful tables
  - f. Community Resources
  
- III. Required Forms**
  - a. Forms 13615, 13206, 13614, Quality Review Checklist
  - b. Posters
  
- IV. Opening Day**
  - a. Supplies
  - b. Equipment
  - c. Volunteer Orientation
  - d. Quality Review process
  - e. Signage/Media Outreach
  - f. Staff Management
  
- V. Tax Preparation**
  - a. Screening/ Interviewing
    - 1. Privacy
  - b. Quality Review
  - c. Completing a Return
    - 1. E-filing
    - 2. Paper returns
  - d. Rejections
  - e. Paperwork
    - 1. Organizing
    - 2. Securing
  - f. Surveys
  - g. Using "Notes"
  
- VI. Volunteers**
  - a. Scheduling/Hours
  - b. Resolving Conflict Issues
  - c. Ethics/Code of Conduct

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- VII. Security**
- a. Safety in the tax site
  - b. Securing equipment
  - c. Taxpayer Information/Privacy Issues

- VIII. Equipment/Software**
- a. TaxWise
    - 1. Overview
    - 2. Print Packets
    - 3. Form defaults
    - 4. Reports
  - b. Equipment
    - 1. Logins/Passwords
    - 2. Save to disk/Restore to disk
  - c. Transmittal
    - 1. On-site transmitting
    - 2. Off-site transmitting
  - d. Software Updates

- IX. Closing the Site**
- a. Material reconciliation
  - b. Correcting rejections
  - c. Backing up files
  - d. Checklist

- X. Current Program Alerts**

Notes: \_\_\_\_\_

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**Sample Schedule  
Saturday (10am – 2pm)**

10:00am	Welcome
10:00-10:15	Roles/Responsibilities
10:15-10:30	Resource Guides
10:30-11:00	Required Forms
11:00-11:30	Managing Volunteers
11:30-11:45	<b>Break</b>
11:45-12:15	Opening Day
12:15-12:45	Tax Preparation
12:45-1:10	Security
1:10-1:30	Software/Equipment
1:30-1:45	Closing the Site
1:45-2:00	Current Program Alerts